



Federal Utility Partnership Working Group  
Spring 2012  
Jekyll Island, GA

# Contracting Officers Guidebook

Energy Lawyers and Contracting  
Officers Working Group

April 12, 2012

# UESC Contracting Documents and Templates

## **Section 1: Choosing a Utility Partner**

- Letter of Interest - template
- Utility Selection
- Utility Implementing Partners
- Order for Supplies or Services – Optional Form  
(not in this quick guide)
- Master Agreement – template

# UESC Contracting

## Documents and Templates

### **Section 2: Preliminary Assessment – Defining the Initial Project Scope**

- Letter Requesting the no cost/no future obligation PA and Preliminary Survey Report - template
- Authorization for Energy Management Services under an AWC – Exhibit “C”

# UESC Contracting

## Documents and Templates

### **Section 3: Defining the Project and Assigning the Team**

- Project Definition Document –sample available
- Team Charter –sample available

# UESC Contracting

## Documents and Templates

### **Section 4: Acquisition Strategy**

- Acquisition Plan –
- Justification for Other than Full and Open Competition
  - Justification & Authorization (1 Utility) - template
  - Justification & Authorization (2 Utility) - template
- Notice of intent (FedBizOpps) – Navy sample
- Formal Market Survey
  - Formal Market Survey Single Utility – template available
  - Formal Market Survey Multiple Utilities – template available

# UESC Contracting

## Documents and Templates

### **Section 5: Detailed Feasibility Study – Project Development**

- Energy Assessment Report Template – use for Scope of Work – template available
- Agreement for Detailed Feasibility Study - template
- Request for Proposal (RFP) for Design and Construction

# UESC Contracting Documents and Templates

## **Section 6: Internal Agency Activities**

- Financing Memorandum of Agreement – template
- Pre-Negotiation Memorandum – template
- Post-Negotiation Memorandum – template
- SF-26 Award Document – sample

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# UESC Contracting Documents and Templates

## **Section 6: Internal Agency Activities**

- Signed Agreement for Energy Management Services under the AWC – sample and GSA form
- Letter requesting Bank Selection – utility's role; Fed's role – template
- Amortization Schedule – sample
- Assignment of Claims – template (in Enabling Documents on page 206)



# UESC Contracting

## Documents and Templates

### **Section 7: Design and Construction - Project Implementation**

- RFP for Design and Construction – template
- Agreement for Design and Construction – template
- Kick-Off Meeting
- Design
- Construction

# UESC Contracting Documents and Templates

## **Section 8: Post-Construction**

- Performance Assurance Plan
  - Operations and Maintenance for Optimal Efficiency
  - Re-Commissioning
- Reporting to FEMP

- For more information (or documents to share) contact:

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